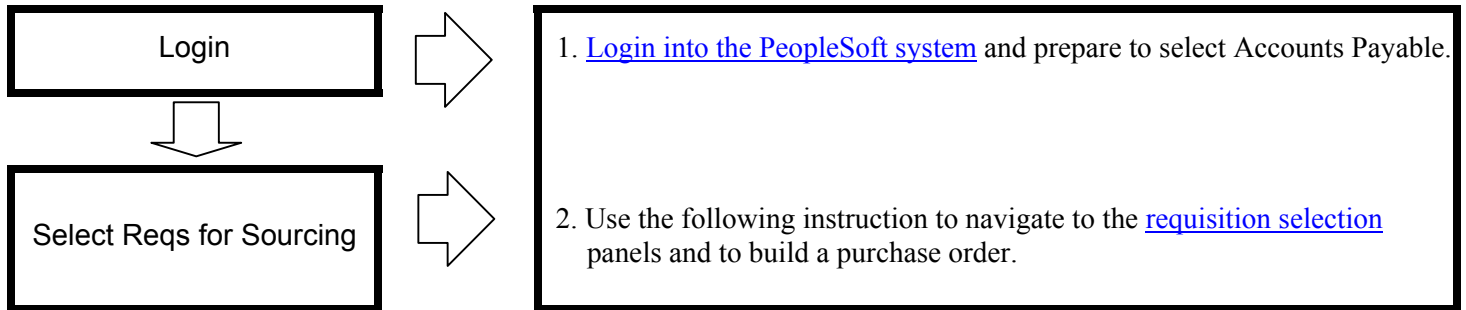# How do I Select a Requisition?
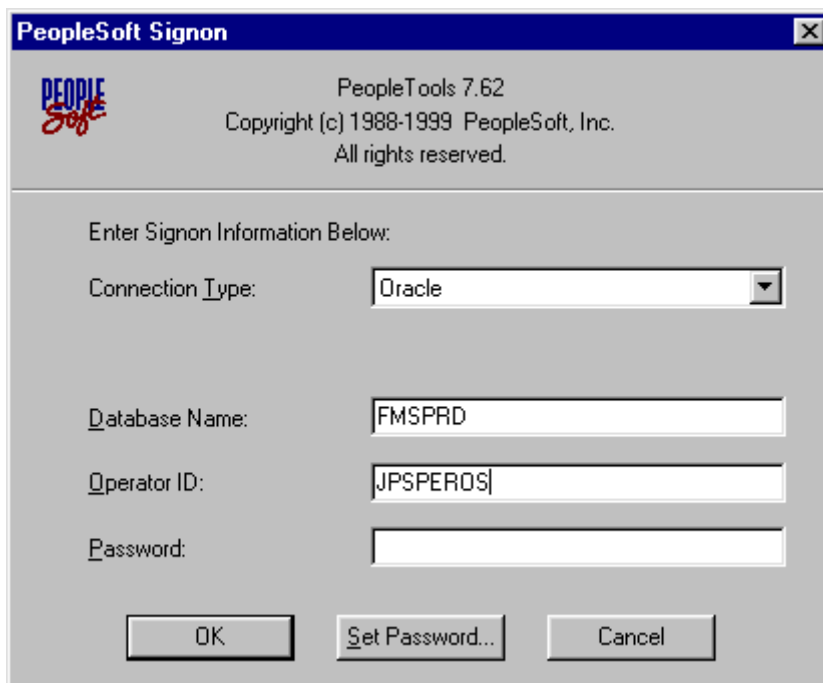
**Prior to the working a purchase order you must source the original requisition.**

| Login |
| --- |

1. [Login into the PeopleSoft system](#) and prepare to select Accounts Payable.

| Select Reqs for Sourcing |
| --- |

2. Use the following instruction to navigate to the [requisition selection](#) panels and to build a purchase order.

# How do I Select a Requisition?

## Step 1: Login

- Launch the PeopleSoft Signon from the Novel Application launcher.
  - Connection type "Oracle" (Defaulted)
  - Database Name "FMSPRD" (Defaulted)
  - Enter your login name. (UPPERCASE only)
  - Password is your login name (lowercase only)

- Click "OK"

# How do I Select a Requisition?

## Step 2: Selecting Sourcing Criteria and Defaults

**From the Requisition Selection panel, you can select requisitions online from requisitions that could contain candidate lines. You can use a variety of selection criteria to select the Requisitions to choose from.**

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Purchase Orders
- ⇒ Use
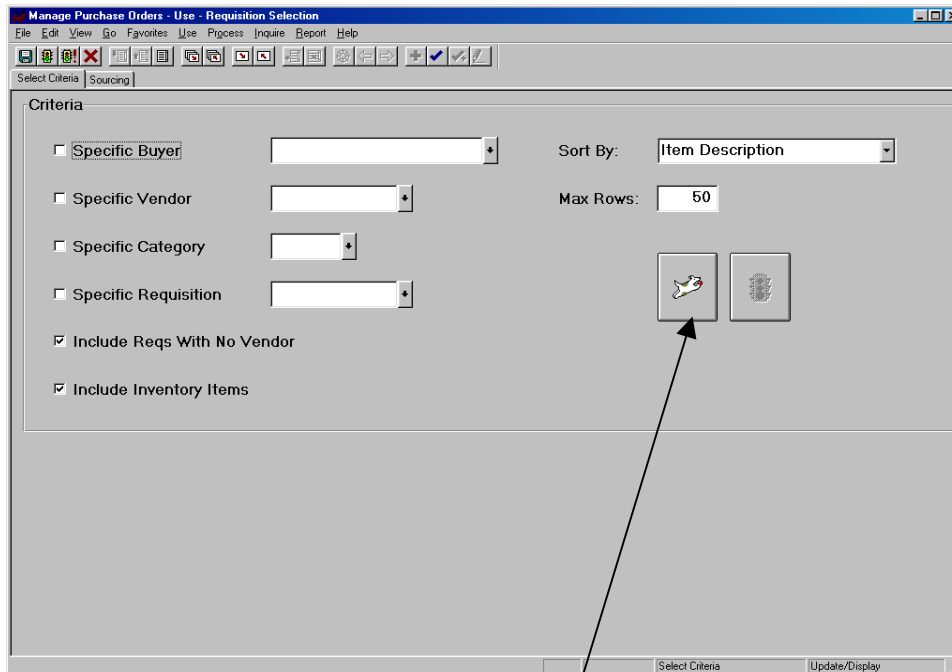- ⇒ Requisition Selection
- ⇒ Select Criteria

### Panel Controls

To limit the requisitions to be retrieved online for further selection, you can use as many criteria as needed. Select the values for these fields.

| | |
|---|---|
| Specific Buyer | To specify a buyer, click on the Specific Buyer checkbox, and enter or select the buyer's Operator ID. The selected requisitions will include only requisitions lines that specify that buyer. |
| Specific Vendor | To specify a vendor, click Specific Vendor, and enter or select the Vendor. The selected requisitions will include only requisitions lines for the selected Vendor. When you select a specific vendor, the Include Reqs With No Vendor becomes unavailable for entry. |
| Specific Category | To specify a category, click on the Specific Category checkbox, and enter or select the category code. The selected requisitions will include only requisition lines that specify that category. |
| Specific Requisition | To select a specific requisition, click on the Specific Requisition checkbox and enter or select the Requisition ID. |
| Include Reqs With No Vendor | Click on the Include Reqs With No Vendor checkbox to select requisitions with and without a suggested vendor. |
| Include Inventory Items | The Online Select process allows you to select requisition lines for inventory items and stage them for Purchase Orders instead of Inventory Demand. To include requisition lines that would normally be sourced from inventory, click Include Inventory Items. |
| Sort By | You can select the order in which you want to view the requisitions selected. Your choices are: Item Description, Item ID, Requisition ID, Vendor ID. |
| Max Rows | To limit the amount of data returned, you can enter a number in the Max Rows field. |
|  | After you set your criteria, click the Select Requisitions Now button to retrieve the requisitions that match your selection. They appear in the Sourcing panel. To access this panel, click the Sourcing folder tab. |

*The Requisition Selection panel displays*
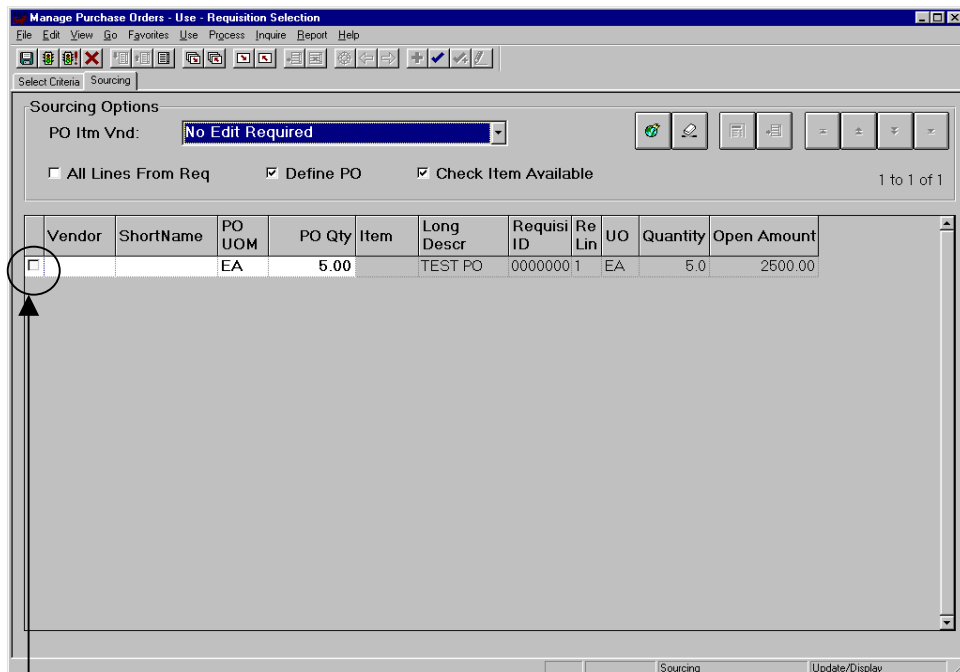


At LBNL we will be clicking on the selection boxes for;

⇒ Include Inventory Items

⇒ Includes Req's with no Vendors

⇒ Specific Buyer

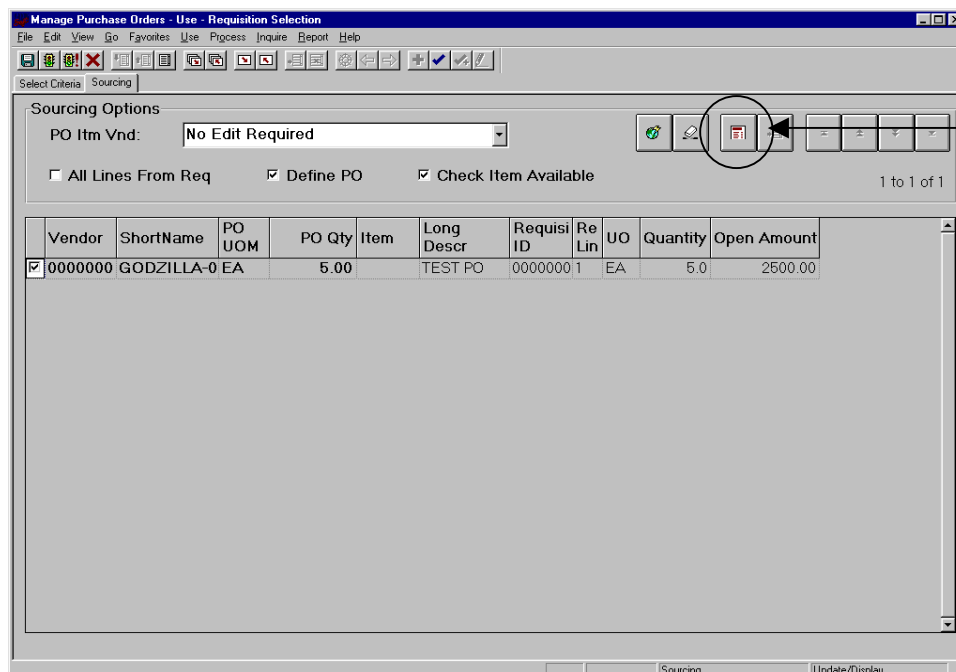o On this selection you can narrow your field to the specific buyer you want to access

Once completed click on the **Fetch** button.

# How do I Select a Requisition?



- If the requisition does not include a vendor at this point, you will be required to add a vendor prior to proceeding.
- Once the vendor has been selected click on the selection box.
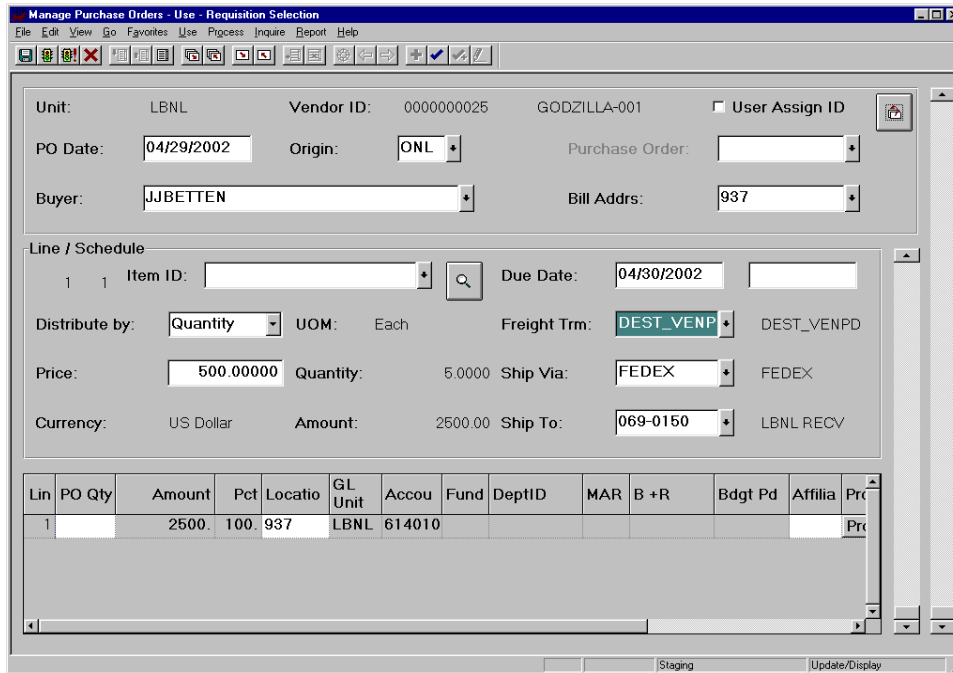- After you've activated the "Selection Box", click on the "Staging Icon".



Staging Icon

# How do I Select a Requisition?

*The Staging Panel will be displayed.*



Change any information on this panel that is required and click **Save** .

Once the panel is saved, the selected requisition will be sent to a purchasing table where it will be picked up during the purchase order build process.